

VTrckS Benefits

VTrckS, which stands for Vaccine Tracking System, is an application that allows grantees to order and manage VFC (Vaccines for Children) and publicly-funded vaccines efficiently. VTrckS combines vaccine ordering, forecasting, budget management, and contract management into one application. VTrckS replaces several CDC legacy systems: VACMAN, VOFA, and NIPVAC, with a modern online system. There are three groups of VTrckS users: Grantees (state, city, and territorial immunization programs that receive federal funding for vaccine purchases), Providers (health care providers that administer vaccines as part of the Vaccines for Children (VFC) program), and the CDC.

VTrckS Benefits for Grantees

Grantees can:

- Monitor vaccine orders from request to delivery
- Process and approve vaccine requests online
- Manage provider information and create customized vaccine lists (formularies)
- Link an immunization information system (IIS) with VTrckS if the IIS already supports providers in ordering vaccine and tracking inventory
- Receive timely information about vaccine order shipments and deliveries
- Access online self-help and other support services
- Manage Spending Plans

VTrckS Benefits for Providers

Providers can place vaccine requests either directly in VTrckS or via the grantee's IIS.

Providers that access VTrckS directly can:

- Place vaccine requests and returns requests online
- Track vaccine requests from the time they are placed until vaccines are delivered
- Submit accountability data
- Access online self-help and other support services

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VTrckS Functionality

VTrckS is a robust vaccine management application that helps grantees and providers to order and manage publicly funded vaccines more efficiently. VTrckS supports the following functions:

- **Spend Plan**
 - Perform an initial annual setup and ongoing updates of grantee schedule, brand allocation and spend plan
 - View and export spend plan and budget reports
- **Provider Master Data**
 - Enter and update information about each provider in the system, such as contact information, business hours, facility type, and special instructions
- **Supporting Documentation**
 - Submit data/documentation for inventory on hand, doses administered, and temperature logs
- **Formulary Master Data**
 - Customize a list(s) of vaccines to control the vaccines providers can request
- **Vaccine Order Entry**
 - Place orders, including direct-ship and high priority orders
 - Manage orders, including approving, modifying and cancelling orders
 - See order statuses and view near real-time shipping status
- **Returns**
 - Submit and manage all returns, wastage and transfer orders
- **Purchase Order Entry and Returns to Manufacturers**
 - Create state-funded POs using CDC vaccine contracts/ Create non-federal return POs
 - Change existing state funded POs made using a non-CDC mechanism
 - Check to status of an existing state-funded PO
 - Check the distributor inventory status for grantee virtual (non-federal) inventory and grantee virtual (non-federal) returns
- **Reporting**
 - View and export reports based on near real-time data
 - Reports include vaccine inventory, shipments, returns, providers, supporting documentation, contracts, spend plans and budget

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- **Provider Functionality**

- Submit data/documentation for inventory on hand, doses administered, and temperature logs
- Place orders, including direct-ship and high priority orders
- Place all returns, wastage and transfer orders

- **External Information System (ExIS) – For grantees that have vaccine ordering and inventory tracking functionality in their IIS**

- Upload provider master data information
- Upload inventory on hand data
- Upload provider orders
- Download shipment information to the ExIS interface

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Obtaining New VTrckS Access

To ensure security for all VTrckS data and to prevent unauthorized transactions from being entered into the system, there are two security layers a user must clear to gain permission to use the VTrckS system. The first layer is SAMS (CDC's Secure Access Management Services) which provides access through the CDC firewall to VTrckS. The second layer is managed within VTrckS and permits individualized access to functionality within VTrckS based on assigned authorized roles.

Identity Proofing Process Overview

For grantee users and providers that access VTrckS directly, identity proofing is the security access process necessary to gain permission to use VTrckS. Identity proofing validates a user's identity against government-issued identification. The identity proofing activity must be completed before requesting access to VTrckS functionality.

Grantee Security Access Process

Each grantee office will identify a designated proofing agent (DPA) who is a person authorized by CDC to conduct and manage the security access process for grantee users. DPAs submit initial registration documentation to request access to SAMS and verify identity documents are accurate for each user.

After the identity proofing process is complete, the grantee user will complete and submit the VTrckS User Access Form to request access to one or more of the VTrckS system roles for each individual staff member.

Provider Security Access Process

Only provider users that access VTrckS directly to place vaccine orders will need to be identity proofed and request access to VTrckS. The 'responsible clinician' (the individual who signs the VFC enrollment form) at each provider site will manage VTrckS access for their provider users. The responsible clinician will work with the grantee to approve new user requests, submit request to register with SAMS for the new user, validate user credentials and submit the Identity Voucher for access to VTrckS.

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Accessing VTrckS for the First Time

Users can access VTrckS by opening their internet browser and entering <https://sams.cdc.gov> in the address box. The user will enter their user name (the email address used to register) and password (the password created while registering with SAMS).

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Maintaining Existing VTrckS Access

Grantee and provider user accounts must be regularly maintained to avoid having to repeat the security access process and to maintain the highest levels of security within the VTrckS system. The following scenarios and procedures outline how to maintain access in VTrckS.

Password Expiration (SAMS)

The SAMS password will need to be reset every 60 days and is required for grantees and providers. When a user logs into SAMS, (10 days prior or after the password expires), SAMS will present the grantee or provider user with a password change page that allows the password to be changed. Once the password has been changed and saved, the user can access to the VTrckS welcome page. Users should access the account at least once per 365 days to keep it active (If a user has not logged into their account within the last 335 days, the system sends the user a reminder that their account will expire in 30 days).

Employee Termination

When a user no longer requires access to VTrckS it is critical that notification is received by CDC within 24 hours. The grantee DPA (Designated Proofing Agent) should contact the Vaccine Order Management Contact Center to request deactivation of the user's SAMS and VTrckS account. The Vaccine Order Management Contact Center's live operators provide assistance in both English and Spanish; and can be reached between 8am and 8pm EST Monday to Friday at 877-878-6247 for the fastest response. E-mail is also available: vaccineordermgmt@cdc.gov.

When a provider user no longer requires access to VTrckS, it is critical that the responsible clinician contacts their state immunization program within 24 hours to notify them of the change in employment status (the reason for change is not necessary). The immunization program will process the request with CDC.

Locating a Lost/Forgotten Password

The user name assigned will be the e-mail address used to register for VTrckS. If the grantee or provider user forgets their password, they can click on the "Forgot" link on the SAMS login page and answer three security questions.

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Providers Transferring to a New Provider's Office

As long as the provider user's SAMS account is still active, there is no need for a provider user to complete the SAMS process again.

Adding/Updating a User's Profile in VTrckS

To request that the individual user's security profile be updated (i.e., e-mail address, user name, mailing address, etc.), grantee users should submit a VTrckS User Access Form via email to the Vaccine Order Management Contact Center at vaccineordermgmt@cdc.gov.

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Deployment Transition to VTrckS

The deployment transition to VTrckS consisted of several steps to prepare grantees for the milestones that occurred before the grantee's Go-Live date and during their first week of Go-Live. The five deployment steps included Grantee Readiness Calls, Flash Calls, Modules and Manuals, Training, and Shadow Sessions.

Grantee Readiness Calls

Grantee Readiness Calls provided an overview of the milestones outlined in the deployment transition to VTrckS and offered an interactive environment for grantees to ask questions that impacted their deployment to VTrckS. The VTrckS vaccine management monthly readiness calls were developed to help grantees prepare for their upcoming transition to VTrckS. Three topics discussed during the monthly readiness call on a rotating basis included: NDC level information in VTrckS, ExIS, and Training. During the call, grantees were encouraged to ask questions in preparation for their transition to VTrckS. Readiness calls commence six months prior to the grantee's deployment date and three months before they began manual and module deployment preparation activities.

Flash Calls

Weekly Flash Calls provided an interactive forum for reviewing progress toward VTrckS deployment milestones. During the calls, grantees heard answers to questions raised and received deployment updates. Flash Calls started 20 weeks prior to the grantee's Go-Live date and included an additional call during their week of Go-Live.

Modules and Manuals

The modules and manuals materials were used to prepare for transitioning to VTrckS. Each module was presented as a webinar providing specific information that grantees required to successfully transition to VTrckS and the activities they were to accomplish before moving on to the next module. Each module had an accompanying manual with more details than provided in the module presentation. Grantees were issued with "homework" assignments due by the next weekly Flash Call. The modules and manuals proved themselves to be an essential element of the deployment preparing transition grantees for their Go-Live date. The six module and manual sessions conducted over a 12-week period prior to Go Live for VTrckS Direct and ExIS grantees included:

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Module and Manual 1: Vaccine Management Overview
Module and Manual 2: Data Cleansing and Conversion
Module and Manual 3: Security Access
Module and Manual 4A: Provider Readiness (for VTrckS Direct grantees only)
Module and Manual 4B: ExIS File Upload Testing (for ExIS grantees only)
Module and Manual 5: Training Preparation
Module and Manual 6: Vaccine Management Transition Activities

VTrckS Training

In Training, grantee users received step-by-step instructions on how to complete different tasks and transactions in VTrckS. Training courses were delivered using a blended learning approach. Students began by participating in a series of webinars. Each class provided an in-depth explanation of the functionality, the impacts that the new functionality would have on their business processes, and step-by-step instructions accompanied by VTrckS screen shots for how to perform each transaction.

Shadow Sessions

Shadow sessions were scheduled via Microsoft Live Meeting during the first week of Go-Live. These sessions provided the grantee an opportunity to place orders in VTrckS. Grantees were also guided through additional functionality in the system (such as generating reports) that they wished to pursue. The Training Team and the Contact Center also attended the Shadow sessions providing real-time support and to answer questions.

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Provider Readiness

Grantees are responsible for developing a deployment plan for rolling their providers onto VTckS. The Provider Go-Live Liaison is the identified person within the grantee office who will be the main point of contact for providers transitioning onto VTckS. CDC recommended that grantees develop a provider deployment plan to begin two months after the Go-Live date. It can be a progressive roll out (10% each month; or 10%, 15%, 20%, etc.) or a big bang roll out – all providers at once – depending upon Grantees preferred provider deployment plan.

Preparing Providers for VTckS

The following materials are available to assist grantees in preparing their providers for VTckS:

- Provider Communications
- Post Go-Live Support
- Provider Training
- Technical Requirements for Providers

Providers are asked to participate in Identity Proofing and training conducted by the provider go-live liaison.

Provider Training

CDC has created provider training materials for the grantees. The grantee can organize their own training sessions that best define the situation and relationship with their providers. The materials are posted online in the training library and are maintained with current information. Providers accessing VTckS directly are required to learn how to process and manage their vaccine orders in VTckS.

Provider Support and Access to VTckS

CDC's Vaccine Order Management Contact Center is an excellent resource for providers to receive assistance. For more information, please read the fact sheet titled "VTckS Support."

Providers require internet access and a web browser to access VTckS. It is important to note if a provider does not have high-speed internet (i.e., they use dial-up or have a slower internet connection) they may experience issues using VTckS. For more information, please read the fact sheet titled "VTckS Technical Setup for Providers."

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VTrckS Training

Grantee Training

During training, grantee users receive step-by-step instructions on how to complete different tasks and transactions in VTrckS. Training courses are delivered using a blended learning approach. Students begin by participating in a series of webinars. Each class provides an in-depth explanation of the functionality, the impacts that the new functionality will have on their business processes, and step-by-step instructions accompanied by VTrckS screen shots for how to perform each transaction. After the webinars, students have the opportunity to practice using VTrckS with an instructor. After go-live, grantees are expected to develop a training program for their providers who will access VtrckS directly.

The grantee training program is designed to allow staff to attend only those classes that apply to the tasks they need to learn to perform for their particular job based upon the role they have been assigned. There are separate training curriculums for VTrckS Direct grantees and ExIS grantees. Grantees (both VTrckS-Direct and ExIS) are responsible for completing the training registration forms and returning them to the training team via the Vaccine Order Management Contact Center.

Training Webinars consist of an in-depth explanation of system functionality that includes business process impacts and system demonstrations. The training webinars are recorded. PDF versions of the webinars are stored on the VTrckS Training Library.

Training Practice Sessions are instructor-led practice sessions that provide hands-on exercises, step-by-step instruction, and system demonstrations. The training practice sessions are recorded. Practice session documents are e-mailed the morning of the practice session. Grid Cards are required for the practice session. The student's logon ID's will start with "G" and end in _510. Training session passwords are provided to be used in the practice session only.

Training Environment is a sandbox where the grantee will have access to a subset of their own data and can practice transactions that will be performed in the production environment. Training user IDs are provided to each student in their training sessions and should be used only while in class. Training IDs for the grantee sandbox are provided to the Go-Live Liaison/Super User to be distributed among staff at the grantee site for continued use as needed. The training sandbox ID's start with a "G" and end in _500.

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Provider Training

Grantees who will be conducting training to providers also have access to the provider training “sandbox” environment and will be able to log on as a provider. Training IDs for the provider “sandbox” are given to the Go-Live Liaison / Super User and can be distributed among staff at the grantee site for provider deployment training preparation. **It is important to note that providers will not have access or be able to log onto the training environment.**

Training Materials and Additional Support

If you need additional assistance with training, there are several resources available to you after deployment.

Training Library: The VTrckS Training library contains up-to-date training materials related to all VTrckS functionality. There are two sets of provider training materials located in the VTrckS Training Library. One set is for the grantee and contains instructor notes. The other set is for your providers. The VTrckS Training library can be found at the following link: <http://vtrcks-library.cdc.gov>.

Grantee Training Environment: Access to the training environment is granted to every grantee user that requests access. Grantees learn how to leverage various skills during training. In the VTrckS Provider Training Environment, grantees can log on as a provider and capture screenshots to use in the development of their provider training materials. Grantees can schedule their staff for provider training with the VTrckS Training Team.

Go-Live Liaison / Super User: Grantees and providers can consult with their Go-Live Liaison and Super User for onsite assistance.

Vaccine Order Management Contact Center: Access to recorded training sessions and webinars can be requested by Grantees and Providers via the Contact Center. Please refer to the fact sheet “VTrckS Support” for additional information.

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VTrckS Technical Setup for Grantees

Access to VTrckS requires that specific technical requirements be met in order to minimize issues when using the system. Prior to logging onto VTrckS users need to verify that they have the correct technical setup for each computer or PC that will access VTrckS. In addition to this initial verification, technical verification should be completed any time a new computer is used to access VTrckS.

It is important to confirm the technical setup for any user accessing to VTrckS by running **the PC Readiness Tool**. The PC Readiness Tool is located in the SAMS home page under “My Applications.” Clicking the link will provide access to the tool and the appropriate user guide to walk through the process.



For grantees, the following minimum technical specifications are required for computers used to access VTrckS. The PC Readiness Tool checks and validates some of these requirements while manual verification is needed for others. The PC Readiness Tool documentation clearly explains when manual verification is needed.

- **Hardware**
 - Desktop or laptop
 - 2 GHz processor or greater

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- 2GB of RAM
- **Internet**
 - High-speed internet access (dial-up not recommended)
 - TLS 1.0 must be enabled in the user's Web browser (steps provided in PC Readiness Tool documentation)
- **Software**
 - Internet 6,7,8 or 9¹ for Windows OR Mozilla Firefox 2.0, 3.0 3.5²
 - Adobe Reader 9 and up
 - Microsoft Office Professional 1997, 2003, 2007 or 2010
 - Java Runtime Environment 1.6.0.26 (update 26)***
 - Adobe Flash 8.0 and up
- **Operating System (OS)*****
 - Windows 2000, Vista, XP (preferred), or 7
 - .NET Framework 2.0 or 3.0
 - 1 GB of free space

¹Internet Explorer 9 conditionally supported until further testing by SAP

²Firefox 2.0 conditionally supported with Windows XP 2002 Prof. 32-bit; Firefox 3.0, 3.5 conditionally supported by Windows 7 32-bit or 64-bit

*If you experience compatibility issues between your operating system and web browser version, please contact CDC's Vaccine Order Management Contact Center at 1-877-878-6247.

VTrckS Technical Setup for Providers

Providers will only need internet access and a Web browser to access VTrckS. However, it is important to note that if a provider does not have high-speed internet (i.e., they use dial-up or have a slower internet connection) they may experience more difficulties using VTrckS.

For providers, the following minimum technical specifications are required for computers used to access VTrckS:

- **Hardware**
 - Desktop or laptop
- **Internet**
 - High-speed internet access (dial-up not recommended)
- **Software**
 - Internet 6,7,8 or 9¹ for Windows or Mozilla Firefox 2.0, 3.0 3.5²
 - Adobe Reader 9 and up
- **Operating System (OS)*****
 - Windows 2000, Vista, XP (preferred), or 7

¹Internet Explorer 9 conditionally supported until further testing by SAP

²Firefox 2.0 conditionally supported with Windows XP 2002 Prof. 32-bit; Firefox 3.0, 3.5 conditionally supported by Windows 7 32-bit or 64-bit

*If you experience compatibility issues between your operating system and web browser version, please contact CDC's Vaccine Order Management Contact Center at 1-877-878-6247.

***Please note that there is limited MAC OS environment technical support for providers.

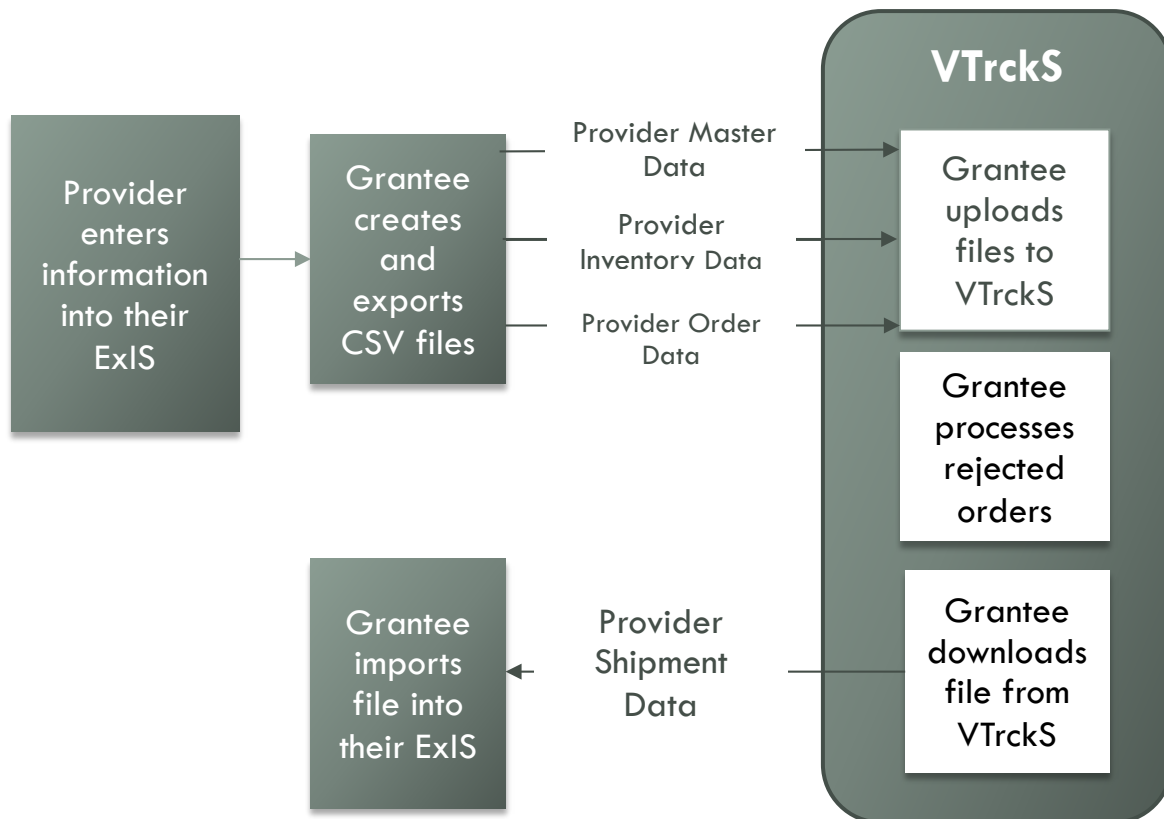
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ExIS Functionality

The VTrckS ExIS (External Information System) interface is a means for grantees to upload provider master data, inventory data, and vaccine requests from their Immunization Information System (IIS) to VTrckS. ExIS also allows the grantee to download shipping information from VTrckS to import into their IIS.

ExIS grantees already rely on their IIS to collect and consolidate data from vaccination providers and to sustain effective immunization strategies through the use of clinical decision support, vaccination coverage reports, interoperability with electronic health record systems, vaccine inventory management, and reminder/recall messages. Adding IIS ordering functionality as part of an interface between VTrckS and the IIS builds on existing relationships with providers and provides an additional incentive for vaccination providers to participate in IIS while promoting greater accountability of publicly purchased vaccine.

Here is an overview of the process:



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ExIS Benefits in VTrckS

There are additional benefits for ExIS users in VTrckS. Users will be able to:

- Create multiple orders from a single file upload
- Receive shipment data for both direct and non-direct ship orders
- Analyze data using SAP Business Objects reports if their IIS does not already have needed reporting capabilities

Providers Ordering Through ExIS

Providers that order through their grantee's ExIS will not have access to VTrckS.

- Providers will continue to place vaccine requests as they do today
- No identify-proofing or VTrckS provider training is necessary

ExIS grantees can export a file with shipment information from VTrckS, as well as continuing to receive the shipment data file from McKesson. Please note that the shipment data file contains information for both non-direct and direct ship vaccine. Providers who have trouble accessing the grantee's IIS will need to contact the grantee for assistance.

ExIS Provider Returns, Transfer, Wastage or Order Changes

The VTrckS ExIS interface does not handle returns, transfers, wastage, or order changes. The grantee will enter these transactions directly into VTrckS.

ExIS Specifications in VTrckS

The ExIS interface needs to meet the VTrckS ExIS specifications, including CSV file formatting, NDC, lot number inventory reporting, and other reporting requirements. CDC will inform the grantee with information regarding the ExIS technical requirements. The ExIS file specifications can be found at: <http://vtrcks-library.cdc.gov/gm/folder-1.1.1.4299>.

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VTrckS Support Overview

CDC has several resources available for grantees and providers when there are questions or additional assistance is requested after deployment.

VTrckS Grantee Support

The following support is available to both VTrckS Direct and ExIS grantees.

Vaccine Order Management Contact Center

The Vaccine Order Management Contact Center offers support or information by telephone, fax, and e-mail. The Contact Center provides assisted service for VTrckS questions in both English and Spanish. Please call 877-878-6247 for the fastest response. E-mail is also available: vaccineordermgmt@cdc.gov. The fax number is 866-958-6247.

Training Library/Training Environment

The VTrckS Training library contains up-to-date training materials related to all VTrckS functionality. Grantees will learn how to leverage the different types of training materials during training. The VTrckS Training library can be found at the following link: <http://vtrcks-library.cdc.gov>. From the VTrckS Provider Training Environment, grantees will be able to log on as a provider and capture screenshots to use in the development of the provider training materials.

Go-Live Liaison / Super User

The Go-Live Liaison and Super User serves as an onsite resource for spend plan, vaccine management issues and questions. Consult with the Go-Live Liaison and Super User for onsite assistance.

FTP Site

Grantees can access the Modules and Manuals and the Vaccine Management Go-Live Checklists along with other supplemental documents referred to in the Modules and Manuals. The Communication Toolkit contains up-to-date materials is available to assist grantees in communicating with providers. It is available on the VTrckS FTP site at <https://sftp.cdc.gov>.

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Project Officer

Grantees should contact their Project Officer for VTrckS deployment related issues.

Vaccine Advisor

Grantees can reach out to their Vaccine Advisor for any issues related to Spend Plan.

VTrckS ExIS Monthly Call and Discussion

The ExIS Monthly Call covers ExIS-related topics and is held fourth Tuesday at 3:00 – 4:00 PM EST for ExIS grantees only. The ExIS discussion offers a message board for ExIS grantees to share ideas, questions, and documents.

VTrckS Provider Support

Vaccine Order Management Contact Center

Should additional questions arise that are not covered in this fact sheet, please contact the Vaccine Order Management Contact Center at 1-877-878-6247 (TTY/TDD at 1-800-232-0038) or email the Contact Center at vaccineordermgmt@cdc.gov. The Contact Center is the central resource that providers can contact for assistance.

VTrckS Training Library

The VTrckS Training Library contains up-to-date training materials related to Vaccine Management. VTrckS users are taught how to leverage the different types of training materials during their training. The library can be found at <http://vtrcks-library.cdc.gov>.

Vaccine Order Management Contact Center

The Vaccine Order Management Contact Center offers support or information by telephone, fax, and e-mail. The Contact Center provides assisted service for VTrckS questions in both English and Spanish.

Contact Center Support

CDC's Vaccine Order Management Contact Center is available to assist grantees and providers. The Contact Center provides centralized support and assists with issues and questions related to use of the VTrckS application.

Call the Vaccine Order Management Contact Center at 1-877-878-6247 (TTY/TDD at 1-800-232-0038) or email the Contact Center at vaccineordermgmt@cdc.gov. The Contact Center is available Monday – Friday from 8:00 AM – 8:00 PM EST, except the following observed federal holidays: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, and Christmas Day. Post-training support will also be provided.

Out of Scope Issues

Although the Contact Center can answer most of grantee and provider questions, there are some areas that are out-of-scope and will be referred to the appropriate resource for resolution. The following areas not supported by the Contact Center:

- Enrollment in the Vaccines for Children (VFC) program
- Local administration of the VFC or publicly-funded vaccine programs
- Vaccine viability issues
- Short-dated vaccine
- Medical inquiries
- Transfer of vaccines to another provider
- Changes to a submitted order
- Emergency orders
- Changes to IPO established ordering frequency and amounts
- Adding to the list of vaccines to order on VTrckS
- Programmatic and policy issues and questions
- Order fulfillment and delivery